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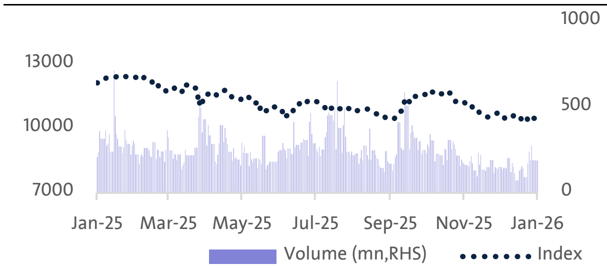
# Daily Market Report

### Key Indices-Return and Valuation

| | 03-Jun* | DoD | MTD | YTD | P/E | P/BV |
|---|---|---|---|---|---|---|
| TASI | 11002 | -0.1% | -0.1% | 4% | 14.6 | 1.6 |
| NOMU | 23007 | 0.2% | 0.2% | -2% | 0.0 | 1.6 |
| S&P500 | 7610 | 0.1% | 0.1% | 11% | 22.2 | 5.8 |
| Dow Jones | 51308 | 0.4% | 0.4% | 7% | 12.9 | 5.9 |
| FTSE 100 | 10374 | 0.3% | 0.3% | 4% | 12.9 | 2.3 |
| EuroStoxx50 | 6108 | 1.2% | 1.2% | 5% | 15.8 | 2.4 |
| Nikkei225 | 66734 | -0.3% | -0.3% | 33% | 24.8 | 3.1 |
| MSCI EM | 1789 | 0.9% | 0.9% | 27% | 13.3 | 2.6 |
| SHCOMP | 4075 | 0.4% | 0.4% | 3% | 14.4 | 1.6 |

### TASI- Index and Volume Trends




### Advance to Decline Ratio

| | Advance | Decline | Unchanged | A/D |
|---|---|---|---|---|
| 03-Jun | 95 | 151 | 24 | 0.6:1 |

### Money Market Yields

| % | SAIBOR | | | Term SOFR | | |
|---|---|---|---|---|---|---|
| | 03-Jun | Δ bps | YTD Av | 03-Jun | Δ bps | YTD Av |
| 1M | 4.65 | -1.8 | 5.6 | 3.62 | -0.2 | 4.3 |
| 3M | 4.81 | -8.8 | 5.4 | 3.66 | 0.2 | 4.3 |
| 6M | 5.19 | -8.1 | 5.5 | 3.72 | 1.1 | 4.2 |
| 12M | 4.82 | 0.2 | 5.2 | 3.87 | 3.9 | 4.0 |

### Commodities

| | | 03-Jun | Δ | 52-week | | YTD Av |
|---|---|---|---|---|---|---|
| | Unit | USD | % | Hi | low | %Δ |
| Arab Light | USDbbl | 109 | 4.1 | 135 | 60 | -9.5 |
| Brent | USDbbl | 98 | 1.9 | 118 | 59 | -9.5 |
| Gold | USDOz | 4441 | -1.8 | 5502 | 3277 | -17.6 |
| Silver | USDOz | 73 | -3.2 | 117 | 35 | -33.7 |
| Aluminum | USDton | 3772 | -2.0 | 3821 | 2446 | -11.7 |
| Copper | USDton | 13932 | -0.3 | 14140 | 9578 | -13.3 |

Av=Average, YTD=Year to Date, MTD=Month to Date, DoD=Day Over Day (*last session relative to session before) **Per 25ton, Source: Bloomberg, TASI

## Saudi Arabia

### Saudi economy proves 'resilient' in face of Iran war: IMF

The Saudi economy is proving resilient in the face of the war in the Middle East thanks to strong fundamentals and diversified logistical and oil infrastructure. The war has nonetheless disrupted its momentum, curtailing oil exports and weighing on non-oil activity and confidence, said the International Monetary Fund (IMF) in a statement at the conclusion of its 2026 Article IV Mission to Saudi Arabia. **(Argaam)**

### Kingdom Holding updates shareholders on SpaceX investment

Kingdom Holding Co. (KHC) said it currently holds a 0.34% stake in SpaceX with a carrying value of SAR 16.76 billion ($4.47 billion) as of March 31, classified as an investment at fair value through other comprehensive income (FVOCI). KHC said SpaceX has filed for an initial public offering (IPO) with the US Securities and Exchange Commission (SEC) for a listing on Nasdaq, according to publicly available filings. **(Argaam)**

### GAS inks LTA with Saudi Aramco

GAS Arabian Services Co. (GAS) signed a long-term agreement (LTA) with Saudi Arabian Oil Co. (Saudi Aramco) to provide in-plant services across various technical disciplines. The agreement is valid for an initial period of six years, with the possibility of extension for two additional periods of three years each, totaling a potential 12 years. **(Argaam)**

### Shalfa signs O&M contract for Tourism Ministry buildings in Riyadh

Shalfa Facilities Management Co. signed a contract with the Ministry of Tourism to provide operation, maintenance, and cleaning services for the ministry's buildings complex and main warehouse in Riyadh. Shalfa announced in May that it had been awarded the project by the Ministry of Tourism for SAR 61.24 million, inclusive of VAT. **(Argaam)**

### Multi Business signs project contract With Saudi EXIM

Multi Business Group Co. signed a contract with the Saudi Export-Import Bank (Saudi EXIM) to fit out and prepare the lender's new headquarters The eight-month contract is valued at more than 25% of the company's 2025 revenue. **(Argaam)**

## Global

### UK employers ask government to ease off on tax and price-gouging claims

The Confederation of British Industry called on Britain's government not to treat business as a cash cow or accuse companies of price-gouging as the country expects to struggle with a cost-of-living shock triggered by the Iran war.

The employer organisation said 31% of British tax revenues last year came from business, the highest proportion since comparable records began in 1998. **(Reuters)**

### US factory orders post biggest gain in 11 months in April

New orders for U.S. factory goods posted their biggest increase in nearly a year in April amid strong demand for commercial aircraft and a range of other goods. Factory orders surged 4.8%, the largest rise since May 2025, after an upwardly revised 1.8% advance in March, the Commerce Department's Census Bureau said on Wednesday. **(Reuters)**

## Commodities

### Oil falls as Lebanon and U.S. ally agree to implement ceasefire

Oil prices eased on Thursday as Lebanon's ceasefire agreement boosted hopes for a broader deal to end the U.S war with Iran, while the U.S. House approved a resolution seeking to curb President Donald Trump's war powers. **(Reuters)**

# Daily Market Report

| TASI & NOMU- Key Statistics | | | | | | |
|---|---|---|---|---|---|---|
| | | 02-Jun | 03-Jun | Δ% | | |
| **TASI** | SAR | | | **DoD** | **MTD*** | **YTD*** |
| Market Cap | bn | 2283 | 2280 | -0.1% | -0.1% | 2.3% |
| Value | mn | 5445 | 4347 | -20.2% | -19.8% | -17.5% |
| Volume | mn | 270 | 217 | -19.4% | -19.3% | -15.9% |
| **NOMU** | | | | | | |
| Market Cap | mn | 7409 | 7422 | 0.2% | 0.2% | -2.2% |
| Value | mn | 26.0 | 16.7 | -35.8% | -23.0% | -34.8% |
| Volume | mn | 2.8 | 2.9 | 1.3% | 4.7% | 15.4% |

*Average for the period, Source: Argaam

| NOMU-Top Gainers | Last Price | Change | |
|---|---|---|---|
| | SAR/sh | SAR | % |
| PRO MEDEX | 96.05 | 9.45 | 11% |
| SMILE CARE | 6.46 | 0.55 | 9% |
| FUTURE VISION | 8.97 | 0.75 | 9% |
| **NOMU-Top Losers** | **Last Price** | **Change** | |
| | SAR/sh | SAR | % |
| ASAS MAKEEN | 22.62 | -3.38 | -13% |
| LEAF | 22.98 | -2.02 | -8% |
| GHIDA ALSULTAN | 19.3 | -1.69 | -8% |

Source: Tadawul

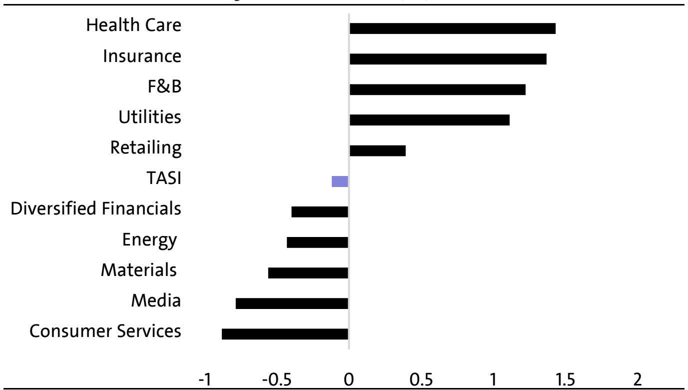
| TASI-Top Gainers | Last Price | Change | |
|---|---|---|---|
| | SAR/sh | SAR | % |
| AMANA INSURANCE | 6.93 | 0.42 | 6% |
| ALHAMMADI | 28.6 | 1.72 | 6% |
| RASAN | 149.3 | 5.3 | 4% |
| **TASI-Top Losers** | **Last Price** | **Change** | |
| | SAR/sh | SAR | % |
| JAHEZ | 14.02 | -0.47 | -3% |
| DBS | 12.84 | -0.41 | -3% |
| ALMAJED OUD | 137 | -4.3 | -3% |

Source: Tadawul

| TASI -Most Traded by Volume | Last Price | Change | | Volumes |
|---|---|---|---|---|
| | SAR/sh | SAR | % | mn |
| AMERICANA | 1.96 | 0 | 0% | 30.9 |
| SAUDI ARAMCO | 27.26 | -0.12 | 0% | 17.0 |
| SAUDI KAYAN | 5.84 | -0.13 | -2% | 10.6 |
| **TASI -Most Traded by Value** | **Last Price** | **Change** | | **Value** |
| | SAR/sh | SAR | % | SARmn |
| SAUDI ARAMCO | 27.26 | -0.12 | 0% | 463 |
| ALRAJHI | 66.75 | 0.05 | 0% | 292 |
| SNB | 39.34 | 0 | 0% | 131 |

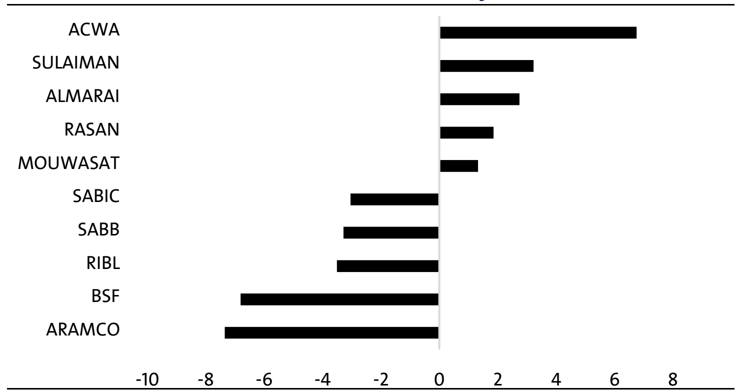
Source: Tadawul

### TASI- Sector-Wise Daily Performance (%)




Source: Bloomberg

### TASI: Point Contribution to TASI movement by Stocks




Source: Bloomberg

### TASI Market Calendar

| Date | Stock/Data release | Event |
|---|---|---|
| 04-Jun | MGC | End of IPO book-building |
| 04-Jun | SAIB | Ex-Dividend |
| 07-Jun | BINDAWOOD | Ex-Dividend |
| 07-Jun | FUTURE CARE | Ex-Dividend |
| 08-Jun | TALCO | Ex-Dividend |

Source: Argaam, GSTAT

### Global Market Calendar

| Date | Country | Event | Period | Forecast | Previous |
|---|---|---|---|---|---|
| 04-Jun | E.U. | Euro central bank Lagarde Speaks | May | | |
| 04-Jun | U.S. | Initial Jobless Claims | May | 211.00K | 210.00K |
| 05-Jun | U.S. | Unemployment Rate | May | 4.3% | 4.3% |
| 09-Jun | U.S. | Existing Home Sales | May | 4.05M | 4.01M |
| 10-Jun | U.S. | 10-Year Note Auction | May | | 4.282% |

Source: Bloomberg, Investing.Com

**Contact Us:**

**Alinma Capital Company**
**Research Department (Sell-Side)**
Head Office: Floor 20, King Fahd Rd, Al Anoud Tower 2, Riyadh 55560
Saudi Arabia
Phone: 011-2185555 =86309
E-mail: research@alinmacapital.com

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